



The Dow Chemical Company



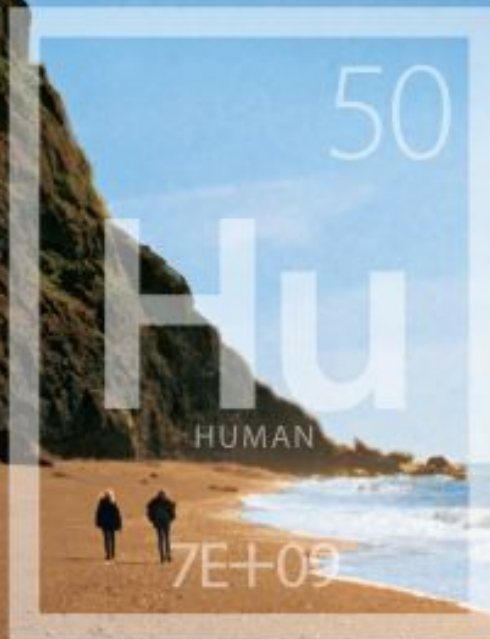


Who We Are

- A science and technology leader with annual sales of \$54 billion
- Founded in 1897 by Herbert H. Dow in Midland, Michigan
- Supplying more than 3,300 products to customers in 160 countries
- Manufacturing from 150 sites in 35 countries
- Employing 46,000 people globally



Our vision is to be the largest, most profitable and most respected chemical company in the world. **Our mission** is to constantly improve what is essential to human progress by mastering science and technology.

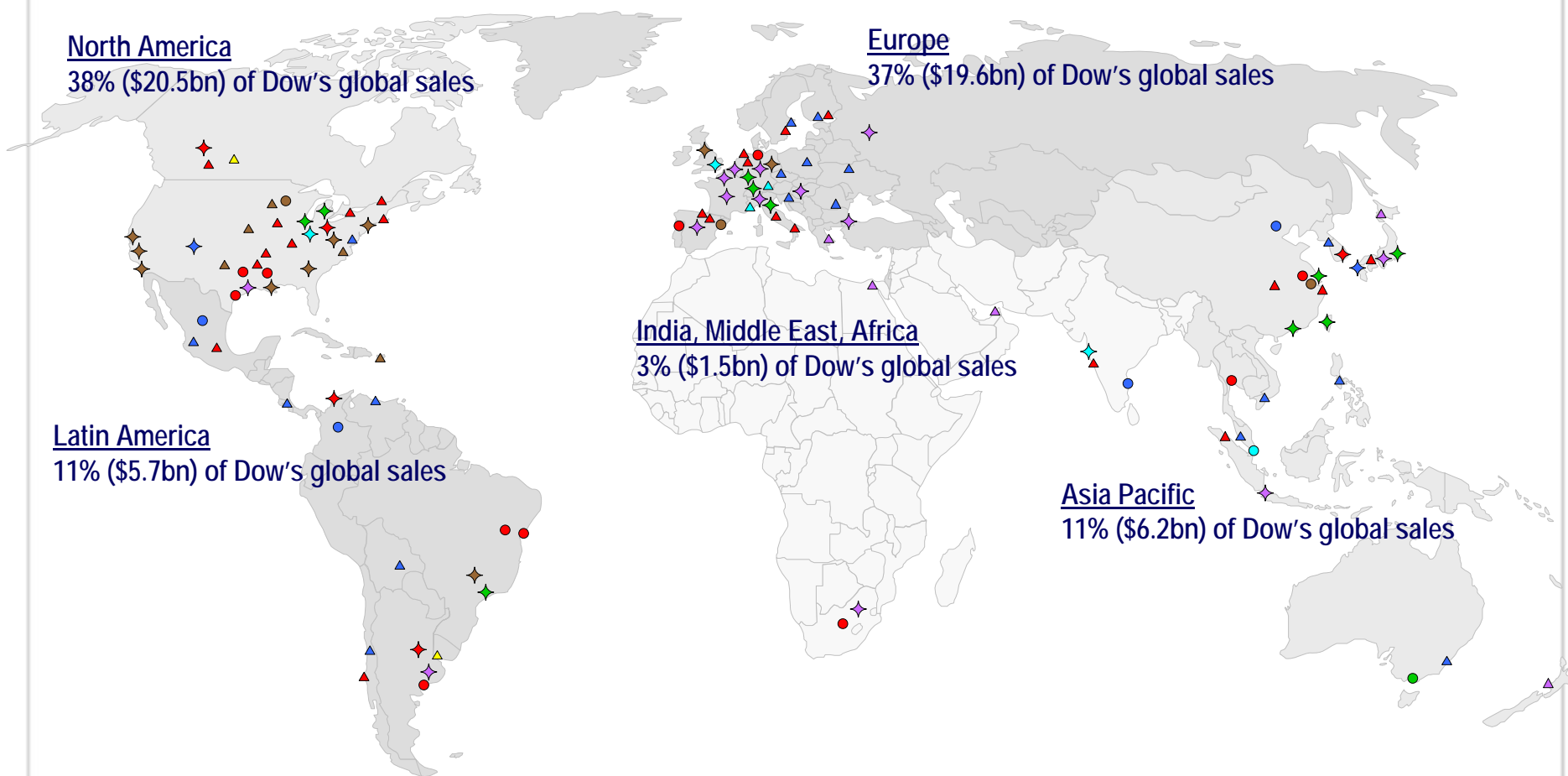




Key Markets and Applications

- Agriculture and Food
- Automotive & Transportation
- Building & Construction
- Coatings & Adhesives
- Electronics & Appliances
- Fabric & Surface Care
- Fiber/Textiles, Footwear
- Flooring
- Furniture
- Health & Medical
- Oil & Gas
- Personal Care
- Water
- Wire & Cable





Dow's Global Reach





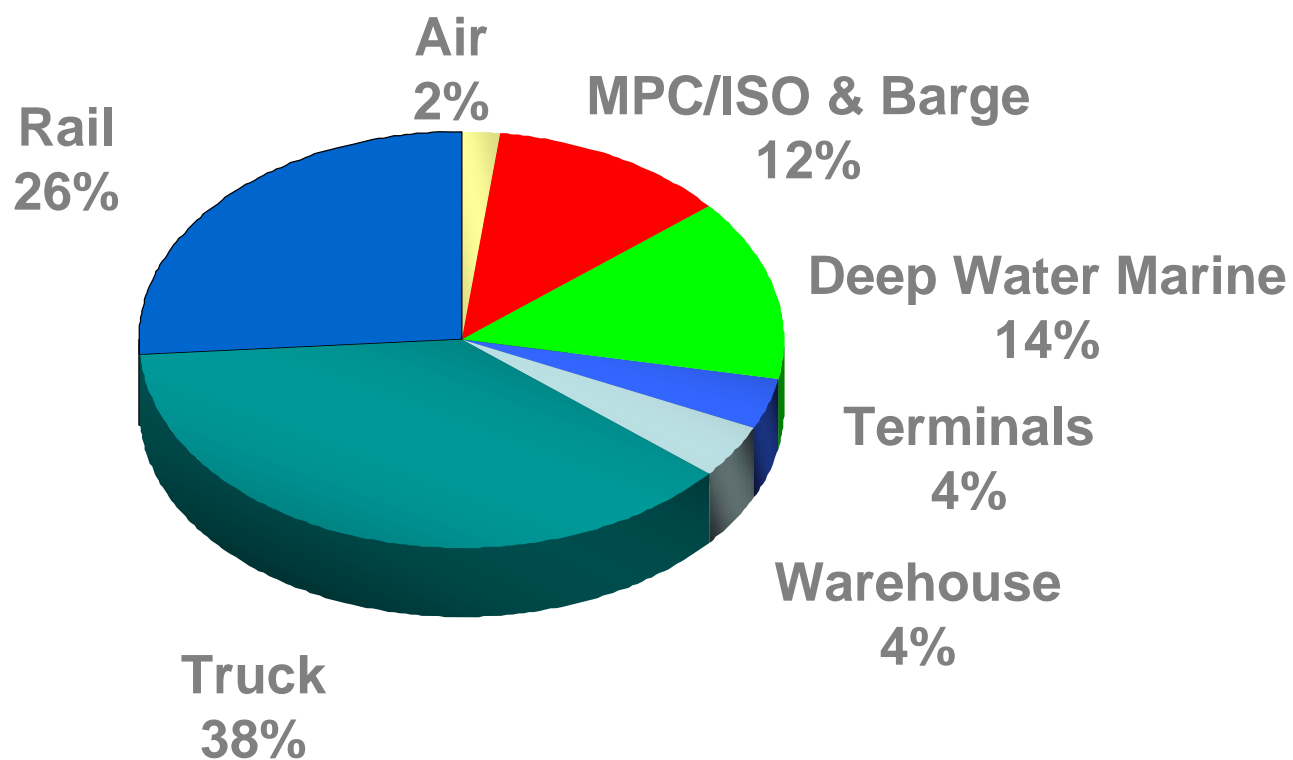
Dow's Supply chain

- Safety is our highest priority
- We have nearly 2 million shipments each year
- We have shipping sites in 200 countries
- 300 warehouses and 122 terminals
- We manage 26,000 railcars – the second largest fleet in the world
- We serve 45,000 customer ship-to locations





Dow's Logistics Spend by Mode



Overall Transportation Global Trends

- Escalating costs
 - Fuel
 - Capital/asset costs
 - Labor
- Equipment shortages
- Captive suppliers
- Regulatory impacts
- Safety/security impacts





North American Challenges

- Escalating operating costs
- Reinvestment costs in infrastructure
- Equipment shortages
- Labor shortages
- Captive suppliers
- Regulatory impacts
- Safety/security impacts





Improving Efficiency, Safety & Security

- Supply Chain design
- Improved shipment visibility
- Risk mitigation planning
- Elimination of non-accidental releases
- Responsible Care[®] transportation requirements
- Carbon footprint reduction
- Global infrastructure advocacy
- TRANSCAER[®]
- Next Generation Rail Tank Car



® Responsible Care is a service mark of The American Chemistry Council in the United States
® TRANSCAER is a trademark of Transportation Community Awareness and Emergency Response.



**Thank
You!**

